Workspace Desktop Edition Help

QA Review of E-Mail

4/7/2025

QA Review of E-Mail

Your system administrator defines the review process in your contact center. Agents might be set up for mandatory review or they might have to request review. There are many ways that an administrator might define the routing of reviewed e-mail interactions; for example, e-mail interactions for review might be routed directly to a reviewer, team lead, or supervisor, or they might be routed to a workbin.

You might be configured to review outbound e-mail interactions created by agents that you supervise, lead, or review, for Quality Assurance (QA) purposes. If you are a reviewer, outbound e-mails are directed to you prior to being sent to a contact.

As a reviewer, you might receive e-mail interactions for review by an interaction preview or you might retrieve outbound e-mail interactions from a workbin.

When an e-mail interaction for review is directed to you, an interaction preview is displayed on your desktop. Click **Accept** to display the interaction; Click **Reject** to return the interaction to the queue.

The Interaction Preview window displays the Case Information view. The **Origin** field specifies the sender of the interaction and indicates that it is for review. You might view and edit the **QA Review Status** field. It contains attached data that specifies the status of the review. When you first receive it, the status might be **Unknown** or **For Review**, depending on how your administrator has configured your system. There might be other information about the priority of the interaction or the business area to which it belongs.

If you accept the e-mail interaction for review, the interaction window is displayed on your desktop. The Case Information view is displayed in the Interaction window. The **Origin** field specifies the sender of the interaction and indicates that it is for review. The **QA Review Status** field is editable. It contains attached data that specifies the status of the review. The Party Status area displays the e-mail monitoring icon () to indicate that the agent is under review. The **Interim Send** button is not available for review e-mail interactions.

You can review the interaction and provide feedback to the agent who originated the outbound e-mail interaction. Depending on the policy at your company, you might provide feedback by directly editing the content of the e-mail interaction, or you might add notes for the agent in the Notepad view, or you might discuss the content with the agent verbally. In the Review E-mail Interaction window, you can do the following:

- Update the Review Status in the Case Information view (if you are configured to do so by your administrator)
- Edit the content of the e-mail interaction
- Set a Disposition
- Add text to the **Note** tab
- Use other standard E-mail Interaction window functions

If you are configured to set the status of the review, your **Send** button might contain a drop-down menu that enables you to select an action to occur when the interaction is sent. You can send the message as Approved to the contact, or return it to the agent as Rejected. Your administrator might have configured different "rejection reasons" from which you can choose.

Otherwise, when your review is complete, set the status in the Case Information are to one of the states that are configured by your administrator. For example, the following states might be available:

- **Accepted**—The e-mail interaction is sent to the contact when you click **Send**.
- **Rejected**—The e-mail interaction is sent back to the agent or to a workbin that contains reviewed interactions when you click **Send**.
- **Unknown**—The e-mail interaction is sent back to the review queue or to a review workbin when you click **Send**.

If you specified **Rejected**, the QA Review Status in the Case Information is updated to **Rejected** and the interaction is returned to the originating agent.